No Worker Left Behind MIS Changes
Webinar 4-29,30-08

Slide Notes

Slide 1: No notes

Slide 2: Good morning (afternoon). Thank you everyone for attending today's webinar on OSMIS changes related to the No Worker Left Behind initiative. As the NWLB initiative evolves, different workgroups have been reviewing program practices and making suggestions regarding the capturing of new or different data in the MIS. Some of the changes we will be discussing today come from suggestions made by those workgroups, other changes come from specific data requests that have been received, like from the Governor's office. We will be covering a number of topics today, and will be showing you screen shots of some of the changes that we have made in the OSMIS.

In today's webinar, we will be covering information on:
Orientation Wait Lists
Waiting for Training Lists
Addition of 2-Year and 4-Year institution names
Making certain WR training activities mandatory NWLB (like WIA)

We will be providing plenty of time for any questions that you have…etc.

Slide 3: In the MIS, we will now ask MWAs to enter information about the people who receive a NWLB Orientation, or who are scheduled to receive such an orientation in the future. With this information, we will be able to track the number of people who have attended an orientation and provide reports to the MWAs on the number of people that you have scheduled for different orientation sessions. to We will also be able create state-level reports about the number of people who are waiting to attend an orientation, but can not do so because of capacity constraints.

For the purposes of NWLB, we are defining an orientation as: The initial meeting, either in an individual or a group setting, where a potential participant first receives information concerning the services available under NWLB. These Orientations may take place either in person or over the phone, so you can see that it may be a very structured information session, or it may be pretty informal. Obviously, different MWAs are going to handle their orientations in different ways.

But regardless of how the orientation is handled, it will be BWT policy that all orientations must be entered into the MIS. It doesn't matter if you have a waiting list or if you do them as requested, the orientation information must be put into the system. This means that if you do an orientation for one person over the phone, that information should be entered into the system. If you schedule people for orientation sessions 2 months out, you put in the information into the system for each person, showing that they have a scheduled date 2 months from now.

Slide 4: For the purpose of reporting data on how many people are waiting for NWLB orientation and how long they are waiting, we will use this definition. An individual is waiting for orientation if their scheduled orientation date is greater than two weeks from the date they signed up for orientation. So, while we want all orientations entered into the MIS, we will not count someone as "Waiting for Orientation" unless they have to wait more than two weeks.

And as we just stated, all orientations will be put into the MIS, regardless of the way the orientation is delivered (in person or over the phone, in a group or individual setting) and if the person had to wait for orientation or not.

Slide 5: Next we will look at the actual changes to the MIS for NWLB orientation.

A new dropdown selection has been added to the top menu bar on the OSMIS. Under Special Functions in the WIA, TAA, Wagner-Peyser and Welfare Reform programs, there is now a selection called NWLB. This menu has two further selections, one for Enter NWLB Orientation and another of Update NWLB Orientation. These are the entry points for putting a new NWLB orientation into the MIS, or for updating an existing orientation record.

These selections work just like other Enter and Update links in the OSMIS – they take you to a Customer Search screen that is used to find out whether the customer is already in the MIS. So, when a person comes in and asks for more information about NWLB and you decide to have them go through an orientation, you go to Special Functions, then NWLB and then Enter NWLB Orientation

Slide 6: Here is the search screen that you get when you click on Enter NWLB Orientation. As with other searches, you can put in a Customer ID if you know it, or search by the customer's Last name, First Name and Date of Birth.

Slide 7: Here is the Customer Search Results screen that we got when we searched for a customer with the last name of "Orientation". If this person is not anywhere in the OSMIS, no names would be listed here, and you would click on "New Applicant/NWLB Orientation" to enter the person into the system. However, if the name is found, the system will bring up this results screen. It displays the customer's name, Date of Birth, ID, Address and Phone. It also has a new field that tells you whether an orientation record already is in the MIS for this person. If this is the customer for whom you wish to enter the new orientation record, select the link in the name field and it will take you to the customer's orientation history screen. It is important to select the customer's name if you can find it, because the system will pull some of that customer's information into the orientation registration screen, saving you from having to re-type it.

Again, if the customer isn't found in the search, you then click on "New Applicant/NWLB Orientation" and it will take you to a blank NWLB Orientation screen where you can put in the customer's name, address and other information.

All right, let's say that this is the customer that we are signing up for orientation. Click on the name link..

Slide 8: …and it takes you to the Orientation Participant History for that customer, if an orientation has been entered for this customer. If the customer already had an orientation record, or multiple orientation records, they would be listed here. It is important to note that a customer can have multiple orientation records entered for them, meaning that they can be waiting for an NWLB orientation multiple times in an MWA, or in more than one MWA if the customer has gone around and signed up for NWB orientation in different MWAs. In fact, there is no limit on the number of times a customer could be signed up for orientation, or the number of times that they can attend orientation. About the only restriction on signing up a person for orientation is that you can not enter more than one orientation for the same Scheduled Date in an MWA. Other than that, the system may ask you to confirm that you want more than one orientation for a single customer, but it won't really stop you from entering multiple orientations.

OK, on this NWLB Orientation Participant History Screen, you will see the Program, which will be NWLB and the Registration Date, which will normally be the date the Orientation is entered into the MIS. There is the date they are Scheduled to go to orientation, the date they Attended orientation or the date they Missed orientation. And finally, there is the MWA that entered the orientation record, the Region Code of the staff member (if it was entered) and the Orientation Site (also if it was entered into the system). These last two, the Region Code and the Orientation Site, may help identify or distinguish between multiple orientation registrations if they exist. They may also be useful in running or sorting the orientation report, which we will talk about later.

Again, you will see this screen only if the person already has an orientation record entered into the system. But let's say they do and you wish to enter a new orientation, you click on "New NWLB Orientation"…

Slide 9: …it takes you to the data entry screen for the new orientation. Here you will find that some of the information is already filled in for you if the person is already in the OSMIS, saving you from having to re-type the information. If they are not in the system, the fields will be blank. It is important to note here that if a person is new to our system, the entry of an orientation record will create a new applicant record for that person in the OSMIS. This record will not have an SSN, and will not commence a participation that would be included in program performance. The orientation record is a semi-separate table that will be used for creating and tracking orientation wait lists, not for program participation.

OK, back to the entry screen: The fields collected are Name, Address, Phone, email, and Birth Date. The phone and email are not required. When you are first putting the orientation record into the system, you will enter the date the person is supposed to attend orientation in the Orientation Scheduled Date field. We will skip Attended Date and Missed Date for now.

The “Orientation Missed Reason” is a system generated field. It will display “None” if the current date is prior to the “Orientation Scheduled Date”, meaning that your customer couldn’t have yet missed their orientation session, or if your customer attends orientation as scheduled and you complete the “Orientation Attended Date” . The system will set this field to “Manual” if you manually enter a date in the “Orientation Missed Date”. And the Missed Reason will be set to “System” if nothing is entered into the “Attended” or “Missed” fields within 30 days after the “Orientation Scheduled Date”.

Other fields that you will enter when putting in the orientation record may include Region Code and Orientation Site. These will help to identify the orientation session the person will attend and will allow you to sort or group reports that you may run on how many people are waiting for orientation and where they are attending.

At the bottom of this page, not shown on this screen here, is the Registration Date field. Usually, this will be today’s date, but could be a date in the past. The Registration Date can not be a future date.

Slide 10: If you try to enter an orientation record for someone who already has an active orientation, you will get this message. This will not prevent you from entering the new orientation; as I said before, there is no limit to the number of orientation sessions that you sign a person up for. This is just a notification asking you to confirm that you want to enter another orientation for this person who already has one. To enter this additional orientation, click on the Confirm button at the bottom of this page.

Slide 11: This is the one error message that you will get that will not allow you to enter another orientation for this person. If a person already has an orientation scheduled on a particular day in your MWA, the system will not allow you to enter a second orientation. The thinking here is that the second orientation is probably a duplicate entry, so the system will block it. You could enter another orientation on a different date, or another MWA could enter an orientation on the same date as yours in their MWA, but you can’t have two with the same scheduled date in a single MWA.

Slide 12: No notes

Slide 13: Here are some of the data enter restrictions on entering an orientation.
Read slide.

Slide 14: OK, you have signed someone up for orientation, and now the date for the scheduled orientation has come and you want to update the orientation record. As before, you go to Special Functions, NWLB and this time go to Update NWLB Orientation.

Slide 15: You get the same search screen as before. Fill in the customer ID, or the customer name to search for the customer record.

Slide 16: You will get the customer search results screen and this time the NWLB Orientation Exists column should say “Yes”. Click on the customer name…

Slide 17: …and you will get the orientation record history for this customer. This person was really anxious to get into an orientation, so they went ahead and got scheduled for 5 different sessions. You’ll notice that these are all in the same MWA, so each orientation is on a different day.

You have to identify the session that you want to update. Again the Region Code, Orientation Site and Scheduled Date may be useful in idnetifying the correct session if there happens to be more than one. Select the orientation session to be updated by clicking on the NWLB link under Program.

Slide 18: This will open the Update NWLB Orientation screen where you can put in the Date the person Attended Orientation, or if the person did not attend, you can put in the Date Missed. Filling in either of these fields will “Close” the orientation record, so this orientation record will no longer be counted on the Orientation Wait List report.

As we talked about earlier, the “Orientation Missed Reason” is a system generated field. It will display “None” if the current date is prior to the “Orientation Scheduled Date”, meaning that your customer couldn’t have yet missed their orientation session, or if your customer attends orientation as scheduled and you complete the “Orientation Attended Date” . The system will set this field to “Manual” if you manually enter a date in the “Orientation Missed Date”. And the Missed Reason will be set to “System” if nothing is entered into the “Attended” or “Missed” fields within 30 days after the “Orientation Scheduled Date”.

An orientation record will also be closed by the system if nothing has been entered in the Attended Date or the Missed Date by 30 days after the Orientation Scheduled Date. This ensures that “forgotten” orientation records do not hang around open in the system forever. When the system closes an orientation record, again if it is not manually closed with in 30 days after the Scheduled Date, it will put the Scheduled Date into the “Orientation Missed Date” and set the reason to “System”.

Slide 19: There are some error messages associated with entering the Attended Date and the Missed Date. Here we see that the Attended Date can’t be a future date.

Slide 20: Here we have some of the other rules associated with entering the Attended Date and Missed Date.
Read slide.

Slide 21: A new report will be created on the system that will provide information about people in your MWA that have been scheduled for orientation, but have not yet attended. You will be able to run this report by a date range that you select, and it will provide a listing of those who are scheduled for orientation within that date range, but have not attended. You will be able to generate, or sort this report by region, county or orientation site if you enter this information into the orientation record.

Slide 22: No notes.

Slide 23: Now we will move to the next change in the MIS, which we call Waiting for Training, or WFT. This is a new activity selection on the MIS, and is given to someone just like any other activity. An individual is waiting for training (WFT) if the decision has been made to pay for their training, but they cannot enter into training within the next two weeks due to a lack of available funding, a lack of program capacity at their chosen training provider, or timing issues. Note here that someone has to be expected to wait at least two weeks to get into training before you would put them into the WFT activity. This is different from the Orientation Wait List where we want all orientations, whether they wait or not, put into the MIS.

The WFT activity may be given to Work First/ JET, WIA Adult, WIA DW and TAA participants. As indicated here, someone who is waiting for training may or may not already be a fully registered participant in the OSMIS. It may be given to a Pre-WIA applicant or a Pre-TAA applicant. The Pre-TAA applicant is a new status in the system that allows a person to be entered into the MIS and given the WFT activity. Provided that WFT is the only activity for the TAA applicant, WFT does not make the person a participant, so the person is not in the participant count, nor are they included in performance measures. The same holds for someone who is Pre-WIA. The WFT activity may be given to a Pre-WIA registrant without making them a performance participant in the WIA program.

Slide 24: Here is the Enter Activities screen for WIA Adult. As with entering any activity, you would get here by searching for your applicant, selecting the correct customer from the search results, and then clicking on Enter Activities, just as you normally would do. A new activity has been added to the list called “NWLB Waiting for Training”. The activities list will look a little different for TAA and Welfare Reform, but will have the same WFT activity.

When you select the NWLB WFT activity and click “Continue”…

Slide 25: …and it opens the data entry screen for the WFT activity.
Here you see the different fields on the NWLB Waiting for Training Enter Activities screen. The first field is the WFT Start Date, this is a required field. The system will default to the service date. You can backdate this field, but you can not put in a future date, meaning you can put someone in as WFT starting next week, or something like that.
Next is the Training Scheduled Start Date, also a required field. This is the date that you expect the person will actually begin their training.
Following that is the reason that the person is WFT. This is also a required field. The reasons for waiting are: Lack of Funding, Lack of Capacity and Timing Issues. These selections may not always exactly match each and every instance that you have someone

waiting for training, but please select the reason, or reasons, that most closely relates to your situation. You are allowed to select more than one reason for WFT.
The Training Estimated End Date will be auto filled by the system using an estimate of the average duration of training in that program.

Slide 26: Here are some of the rules for entering WFT.

The first bullet point here says that an individual cannot be active in training and be placed in WFT at the same time. This makes sense, someone can't be waiting to go into training if they are already currently in training. However, if an individual has been in training in the past, and that training activity has ended, they can be placed in WFT.

Read other two points.

Slide 27: In WIA and TAA, the WFT activity is a Common Measures initiating/extending activity. The WFT Scheduled Training Start date will work like a Future Service in WIA. The system will not exit a record if the WFT activity has no End Date and if the WFT Scheduled Training Start Date is in the future. So, WIA or TAA records that have an open WFT (or an empty WFT end Date) will extend participation and will not be Common Measures system exited. Once the End Date is entered, or if we reach the Scheduled Training Start Date, the WFT activity will end and the record will follow the normal Common Measures system exit process. If the Scheduled Training Start Date passes, the system will end the WFT and put the WFT Start Date into the End Date, meaning that this will be a one day service in the MIS.

We are planning to modify the Anticipated Exit report that you all receive to include those WFT activities whose Scheduled Training Start Date is in the next 5 days, so you can plan and manage your system exits, just as you do for other activities.

And lastly on this slide, if an individual is in WFT and a training activity is entered into the system for this person, the system will put the Start Date of that training activity in as the End Date of the WFT, as we have said before. Just as a note here, if the training start date is altered or deleted later, the system will re-set the WFT End Date as appropriate. Also, if any new training Start Date is entered, the system will look to see if the date is earlier than the WFT End Date. If it is, the system will change the WFT End Date to that new, earlier training Start Date.

Slide 28: No notes

Slide 29: We have already looked at the Enter Activities screen for WIA. Here were are looking at the Enter Activities screen for Welfare Reform. As you can see, it has the same NWLB Waiting for Training activity as we saw for the WIA program. In Welfare Reform, in order to be in Waiting for Training, the individual must be in Work First/JET or Food Stamps, because those are the only Welfare programs that we currently include in the NWLB initiative. Additionally, a participant must have attended General Orientation before they can be placed in WFT.

Slide 30: And here is the TAA Enter Activities screen. Again, the “NWLB Waiting for Training is at the top of the activities list, just like WIA. The other TAA activities are now listed in a group here called Trade Act Services.

As we mentioned earlier, in TAA, WFT can be provided to someone who has just a TAA registration and it will not make the individual a participant. If the only entries in the system are the TAA registration and the WFT activity, the individual is not a participant and will not be included in TAA performance.

Slide 31: New reports will be created for WIA, TAA and Welfare Reform. These reports will be found on the MIS under the reports section. These reports will provide a list on anyone WFT in that program in your MWA. The report will list information such as the time period and the program covered by the report, participant’s name, Start of WFT, Training Scheduled Start Date, Region Code and County Code. The report for Welfare Reform will also list the District Code. The report for TAA will show the petition number and the Participation Date so you can tell whether or not the individual is a TAA program participant.

For WIA and TAA, we will modify the Anticipated Exiters Report to include those individuals whose WFT Scheduled Start Date is within the next 5 days. This report should be reviewed to determined if any participants are going to system exit because the Training Scheduled Start Date is coming up. Remember the Scheduled Start Date acts like a future service, keeping the participation open. If the Scheduled Start Date is the latest date of any service, it may be keeping the Common Measures record open. Once it passes, the record may system exit. You will want to review the Anticipated Exiters Report to control and manage those exits.

Slide 32: Two new dropdowns have been added to the Training activities screens for WIA, TAA and Welfare. These are “2 Year Institution Name” and “4 Year Institution Name”. When a participant is place into NWLB training the “Training Institution” field must be completed. This field has several possible selections such as “Remedial Education”, “2 Year Institution”, “4 Year Institution”, “Proprietary”, “Employer” and “Other”.

If “2 Year Institution” is selected, then the name of the institution must be selected from the dropdown listing in the box below. The dropdown is an alphabetical list of all of the accredited 2 year educational institutions in the state. The list should be complete, but we have also included an “Other” selection on the list. This “Other” may be used for out-of-state training providers, or if an institution is missing from the list. Again, the list is alphabetical, so “Other” is about in the middle of the list.

The “4 Year Institution Name” list works the same way. These fields will be required any time 2-Year Institution or 4-Year Institution is selected from the “Training Institution” field.

Slide 33: Our final topic for today are the MIS changes that will require that participants who receive certain training activities in Work First and Food Stamps to be mandatory NWLB participants.

Several Welfare activities in Work First/Jet and Food Stamps will require the participant to be a NWLB participant in the MIS, meaning their NWLB indicator will be set to Yes, and the required NWLB questions must be answered. This includes the "Offender", "Disability", and Employed at Registration" questions in the registration. This will work exactly like WIA training and TAA training already work; if someone in the program goes into a training activity, they are required to be NWLB.

In Work First/Jet, if someone goes into On-the-Job Training, Vocational/Occupational Training, Condensed Vocational Programs or
Internship, Practicum & Clinical, they will be mandatory NWLB. In Food Stamps, if they are placed in Vocational/Occupational Training, they will also be mandatory NWLB.

The mandatory NWLB changes for Work First/Jet will go into effect on the day that the changes are moved into the regular production MIS. This means that anyone placed into one of the training activities listed here on or after the day the changes are implemented, will be NWLB. We are not going to go back and change anyone prior to the implementation date, just from that date forward.

Just as a note, for Work First, this mandatory NWLB will include Non Custodial Parent and Non Cash Recipient participants.

Slide 34: So for example, if someone in Work First/Jet is put into On-the-Job Training after these changes take effect, they automatically become NWLB. Upon putting the training activity into the MIS, you would have to complete the "Training Institution" field. If the training institution is 2-Year or 4-Year institution, you must select the institution name in the new name fields. And as with other NWLB participants, the "Field of Study" must also be completed when the training activity is entered.

When the Training Activity is ended, The Completed Activity and Credential Received fields must be completed. Again, this in only for those selected training activities that we saw on the previous slide that began on or after the implementation date. You do not have to go back and fill out these fields for people that entered these training activities prior to implementation.

Slide 35: And finally, when the NWLB participant is terminated from Work First or Food Stamps, you must answer the "Employed at Termination" field. If this is "Yes", you must complete the "Occupation at Termination", "Industry at Termination" and the " Hourly Wage" fields, just as you currently do for participants that you manually make NWLB.

Slide 36: No notes.